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ABSTRACT

This paper provides a view of learner relationship management that looks to examine the potential for learning systems across an organizational value chain by addressing the potential for learning solutions beyond the Human Resources function in an organization. It identifies a return on investment strategy to align the goals of the organization with the goals of the learners. It also looks to leverage lessons learned from other technology-based initiatives, namely customer relationship management (CRM) systems and supply chain management systems, both of which also attempt to add value throughout the value chain. (Author)

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Learner Relationship Management: Impacting the Top and Bottom Line

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Abstract: This paper provides a view of learner relationship management that looks to examine the potential for learning systems across an organizational value chain by addressing the potential for learning solutions beyond the Human Resources function in an organization. We identify a return on investment strategy to align the goals of the organization with the goals of the learners. We also look to leverage lessons learned from other technology-based initiatives, namely customer relationship management (CRM) systems and supply chain management systems, both of which also attempt to add value throughout the value chain.

The future rests on how we learn. While this has historically been the lexicon of institutions of higher education, and to some extent the K-12 education system, more and more decisive business leaders are looking toward learning programs and systems as strategic business opportunities. This has caused organizational learning to extend and move beyond the traditional Human Resources departments and squarely into the sights and purview of business unit owners.

To that end, there is a meaningful shift in the view of learning as a way to solve business problems, not just as a means to address training problems. This opens up the door to extend the infusion of instruction, knowledge management, and collaboration to the supply-side and the demand side of the organizational value chain as well as to more effectively and efficiently offer learning solutions intra-organizationally.

Figure 1. The Multiple Facets of Organizational Learning

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Learning in this context has rapidly evolved from traditional stand and deliver training courses and computer- based training environments sponsored, designed, operated, and delivered from the Human Resources department to a wide suite of communication, collaboration, and learning systems that permeate all aspects of the organizational structure. While much of the technological focus of corporate learning initiatives has been placed on Learning Management Systems (LMS), Learning Content Management Systems (LCMS), and reusable learning objects, another, and perhaps more important, advance has also been achieved. Organizations are beginning to see explicit business value from provide exactly the right information, at exactly the right time, in exactly the right format, through exactly the right media to a much larger group of individuals both within and beyond the organizations walls. Along with the additional scope associated with moving learning content and delivery system beyond the walls of the organization, come the additional owners associated with these problems and solutions. More and more we are seeing business unit owners developing and executing learning strategies and projects. Those of use in the learning services field need to realize that these individuals have a set of wants, needs, and desires that we can fill in order to deliver on the promise that we have made on the value of learning within and beyond an organization.

This changing view of organizational learning requires those of us that support such initiatives to look beyond instructional design and content authoring tools and techniques, to a more expansive set of offerings. To maximize the efficiency and effectiveness of any large scale initiative, we must look at a tool box that includes lessons learned from other large scale technological and organizational change initiatives. These include both the technologies to support the initiatives as well as the processes and project management skills required to assure an appropriate payback to the organization. These environments and projects also require us to work together to develop solid business plans and models to leverage all of the costs associated with these initiatives into acceptable return on investment metrics.

Learning from CRM and Supply Chain Initiatives

In the past decade significant hype as well as meaningful advances have been made using technology-based solutions to impact various aspects of an organization's value chain. From the significant growth of customer relationship management (CRM) processes and technologies to provide clients and customers with an more valuable experience with the organization both now and in the future, to the emergence of similar systems to support all aspects of supply chain management, from the acquisition of raw materials, to product creation, and eventually to their ultimate and timely distribution, organizations are looking to introduce both effectiveness and efficiency into all aspects of their operations.

One positive aspect of these initiatives includes the pervasive nature of them across the corporate landscape. Organizations have come to grips with the people, processes, and investment needed to implement large scale CRM and Supply Chain Management solutions. They are beginning to understand the ongoing investment required to support and maintain these systems that once promised their patrons the vision of a "silver bullet" where business gains would magically appear. The harshest critics of these solutions state that they have been over sold, over hyped, and under delivered.

A key challenge to these environments is often the lack of alignment between the wants, needs, and desires of all relevant audiences that are required to use the system. This misalignment can cause systems to fail, or more typically, to atrophy from lack of consistent use. In either case, the business model and return on investment metrics do not live up to the promise that is associated with these projects at the start of the initiative. As we begin to see why spread interest in more holistic learning solutions within organizations, those of us in the learning services space need to make sure that the alignment of all the stakeholder and user needs are constantly monitored throughout all aspects of an initiative. This includes the project kick off, the design, delivery, and implementation as well as ongoing assessment and evaluation and program refinement.

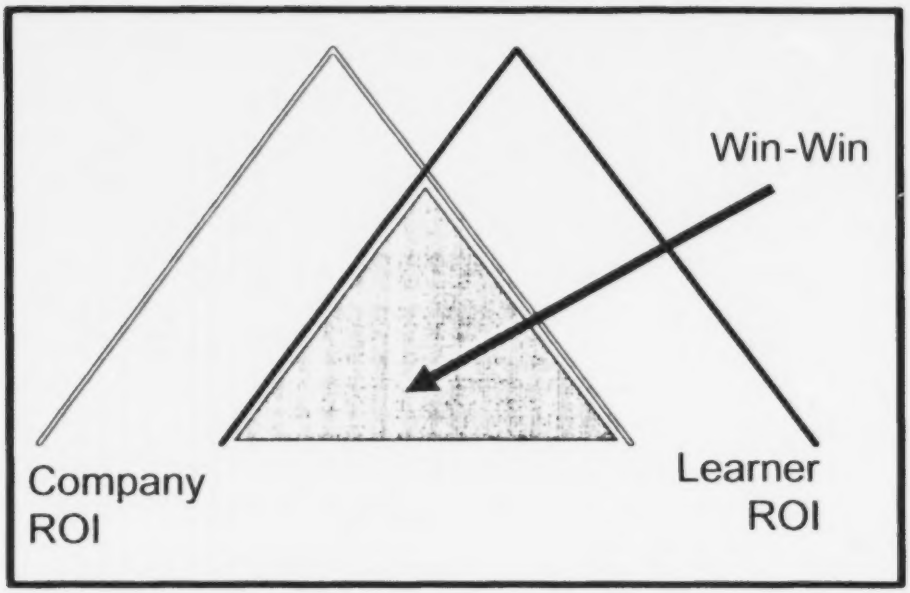

Figure 2. A Multifaceted View of Return of Investment for Learning Systems.

Technological solutions and services organizations

The notion of Learner Relationship Management looks to leverage learning systems, learning processes, and learning content across an organizational value chain. This is critical as organizations move their view of learning from a cost center to a revenue generating (or cost containment) side of their businesses.

Creating business value involves changing behavior, and effectively and efficiently changing behavior requires the design, development, implementation of appropriate learning tools and environments. Our approach to Learner Relationship Management is tailored to aligning the needs of the organization and the wants and needs of the individual at any point in the value chain. Solutions need to deliver timely, specific, relevant information to the learner to effect positive change in their behavior and help them make wise business decisions. We have found that by combining state of the practice learner research with deep industry knowledge we are able to examine and develop personal, meaningful and relevant learning contexts.

The following figure shows an example of how an organization can leverage its content distribution and learning management system to effectively and efficiently deliver learning experiences and assess the success of these systems to a variety of constituencies. Such a model looks to maximize the investment in both the technological infrastructure and the content development process to the largest number of potential audiences. Organizations that are successful in doing so not only increase their reach within their organization landscape but also successfully drop the cost per unit of learning for each audience member.

Such a system requires a systematic and systemic view of learning and a targeted view of the wants, needs, and desires of all potential audience members. This model needs to be addressed in the visioning process for any initiative and then carried through in the projects design, development, implementation, and assessment components of the project. Technologists, instructional designers, content strategists and developers, and user experience design experts need to be have a clear vision of all of the audiences which may user the system and a clear vision of their goals for system interaction. With these criteria clearly defined this team will be able to create an environment that can be successful in meeting the needs of multiple audiences, rather than have to develop disparate system to meet multiple goal states.

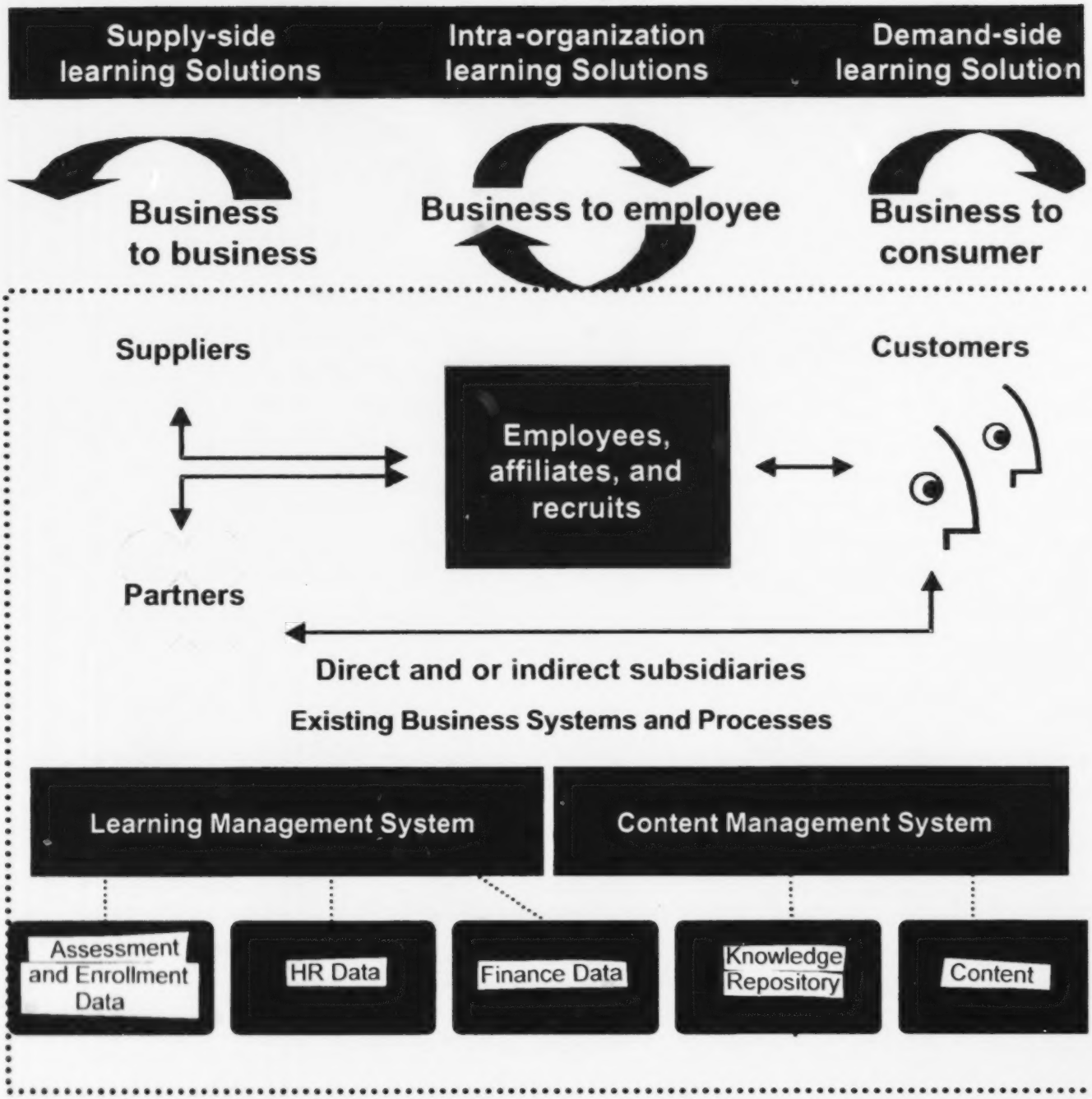

Figure 3. Learner Relationship Management: Creating Value Across the Value Chain

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Learning Offerings across the Value Chain

To identify the opportunity for learning based solutions across the value chain to be developed for such systems, one must first identify the potential business opportunities and challenges that exist both within and beyond the organization. Again, it is critical to view these challenges in terms of their explicit business needs and to establish success metrics that are based on readily quantifiable business results. The follows are a brief set of examples of how learning solutions can add value across the value chain.

Supply Side Learning Solutions

As organizations look to maximize the efficiency and minimize the churn among their suppliers and partners, learning solutions have the potential to add explicit by providing business process education for suppliers and partners to enhance the effective and efficiency of their workflow. These environments can also provide business process education and establish a community around distributed design and development activities. Likewise they can provide educational experiences around hot topics such as collaborative commerce solutions and plan and execute systems to reduce risk and enhance adoption of these types of solutions.

Intraorganizational Learning Solutions

Internally these types of learning solutions can be an agent for delivery of business process education for employee effectiveness. They can also be the integral system to support internal knowledge management. An organization can also use the learning and content management technologies to design and monitor employee proficiency.

Additional we are seeing an opportunity to create a sense of brand awareness within these systems to help employees feature and differentiation their products and services for enhanced performance. The system can also be pointed to support new employee orientation as well as recruitment experiences to ensure success and reduce turnover.

Demand Side Learning Solutions

As more business unit owners look to implement learning solutions, it is only natural for them to begin to see how they can leverage their learning content and infrastructure to support and enhance their relationship with their customers and clients. Learning solutions hold to potential to support business process education to customize the experience for high volume purchasers. These solutions also cam provide an extended type of marketing channel where an increased customer value can be derived from educationally oriented marketing materials. Organizations can also achieve a first mover advantage by providing their clients exactly the right information to before their job functions, this grabbing additional market share.

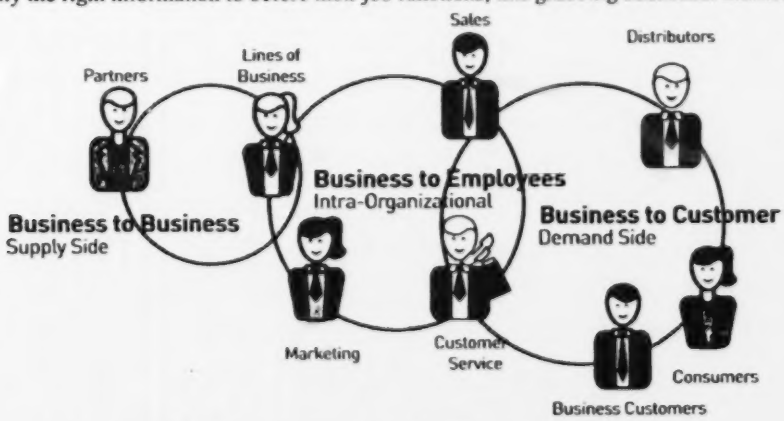

Figure 4: The Business of Learning across the Value Chain

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Summary: Return on Investment as the Mantra for Organizational Learning

As stated previously, return on investment has become the current hot topic in the Learning Services industry. People are looking to build out realistic business cases and business models for all of their learning related initiatives. It is important to realize that these models and metrics need to take into consideration both the needs of the learner and the business needs of the organization.

The following is a typical model that looks to place the learning at the center of the learning landscape. Those of us in the learning field have long recognized that placing the learner and the learning context in the center and then developing the pedagogical, content development, community. Technological, and evaluation and assessment models provide the optimal experience for the individual learner.

Figure 5: Placing the Learning at the Center of the Learning Universe

What we haven't been so successful in doing is realizing that we need to have similar approach to align the business needs and objectives of the organization in a similar model. By broadening the view of learning beyond their internal organization and structure, companies are able to leverage their investment in both their learning systems and content development costs. They can then rationalize both of these investments against measurable business results.

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